

Prominent trends in nature-based tourism – An international comparison

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Nature-based tourism (NBT) is an increasingly important sector of the economy for many countries rich in outdoor recreation opportunities, especially so in rural regions where expectations for economic growth are high (Hall & Boyd, 2005; Fredman & Tyrväinen, 2010). NBT is also subject to significant changes due to social, technological, economic, environmental and political factors, referred to as mega-trends (Dwyer et al., 2008), where a trend implies a general direction in which something is developing, changing or people are behaving. This paper aims to identify the most prominent trends in NBT within and across five countries / regions with respect to their commercial potential.

The Delphi Method

To study trends in NBT and associated commercial opportunities, five panels of experts were engaged using Delphi methodology. The Delphi method is a structured communication technique organized in several iterations where respondents receive controlled feedback for each repetition, and the researcher is looking for convergence in the distribution of opinions (Landeta, 2006). There were 73 experts from Norway (21), Sweden (21), Finland (10), the European Alps (10) and the Western United States (10) invited to participate, whereof 69 remained for the second round. In order to capture the diversity of the NBT sector, experts came from a range of private and public domains associated with nature-based tourism and outdoor recreation: National or regional ministries; regional tourism associations; tourism marketing organizations; nature-based tourism companies and associations; outdoor industry (equipment, clothing); outdoor recreation organizations; academia and consultants; special interest media; and youth organizations.

The questionnaire was developed based on previous Delphi-studies in the tourism literature (von Bergner & Lohmann, 2014; Donohoe, 2011) and a literature review on megatrends affecting nature-based tourism (Elmahdy, Haukeland & Fredman, 2017). The first round of the survey was exploratory and included open-ended questions where experts identified and described up to five major trends in nature-based tourism in their country / region with a 10-year time horizon. The trend identified as the most important by each expert in his / her country / region was then followed up with questions regarding drivers, challenges and opportunities for the NBT sector. In the second round of the survey, the expert panel of each country / region received a list of the most prominent and frequently reported trends in their own country / region (domestic trends) as well as for the other countries / regions (international trends). For each trend, experts indicated the degree to which they think it will impact commercial opportunities in the NBT sector in their country / region the next 10 years (negatively or positively) on a seven point scale. There was also an option to mark the trend as not relevant. In the third and final round, experts are presented with the results from the

second round (their own answers and the average answer by all experts in their country / region to each question) with the opportunity to adjust their answers.

Trends in nature-based tourism

The first open round of the Delphi study identified approximately 150 different trends. Analyses of these trends by the research team resulted in some of them being re-classified as changes in activity participation (a second part of the study not reported here), while other could be merged into one single trend with a common direction. Hence, for the second round of the study, 36 major trends in NBT were subject to evaluation by the expert panels (except for the US survey, which included 20 trends). Table 1 reports the five most prominent trends in each country / region after the second round of the Delphi survey.

Table 1. Five most significant (positive) trends in Norway, Sweden, Finland, the European Alp region and Western United States. Mean values of seven-point scale (-3: large negative impact, +3: large positive impact).

NORWAY	
Experience local culture and locally produced products, food etc.	2.3
Sustainability and responsible travel	2.1
Commercial guided services or courses in nature	1.9
Authentic nature and culture experiences	1.9
Personalized and exclusive experiences in nature	1.9
SWEDEN	
Increased international demand	2.3
Nature experiences combined with high quality facilities and services	2.3
Experience local culture and locally produced products, food etc.	2.3
Demand for remote and unique places	2.3
Simple and easily accessible activities (soft adventure)	2.2
FINLAND	
Physical activities in nature for health and fitness	2.4
Experience wild food (berries, mushrooms, game, herbs etc.)	2.3
Increased international demand	2.2
Health and wellbeing from nature experiences	2.2
Sustainability and responsible travel	2.1
EUROPEAN ALP REGION	
Digital marketing, trip planning, and booking	2.5
Health and wellbeing from nature experiences	2.1
Experience local culture and locally produced products, food etc.	2.0
Nature experiences combined with high quality facilities and services	1.9
Authentic nature and culture experiences	1.8
WESTERN USA	
Product customization for different markets	2.3
Sports/ activity-oriented nature-based experiences	2.0
Increased demand in the winter season	2.0
Health and wellbeing from nature experiences	2.0
Commercial guided services or courses in nature	1.9

Results show several similarities across the countries / regions, but also some noticeable differences. Experiencing local culture and locally produced products and food is a recurrent trend in this context, reported among the top three trends in Norway, Sweden and the

European Alps region. It also scores high in Finland, although not on the top-tree level. An increased international demand for nature-based tourism experiences is a major trend in the Nordic countries, but not to the same extent in the other regions studied. The Norwegian expert panel rates sustainability and responsible travel high, while Swedish experts put more emphasis on nature experiences combined with high quality facilities and services. Finnish experts judge physical activities in nature for health and fitness to be the most significant trend in terms of commercial opportunities in the NBT sector within the next 10 years. In the European Alps region, digital marketing, trip planning, and booking is reported as the most significant trend. The western US diverge from the other countries/ regions in several respects. Trends reported from this region focus to a larger extent on availability and funding of public land and user conflicts, compared with the other countries / regions, but the highest score is given to product customization for different markets. Commercial guided services or courses in nature, which scores third in Norway, is also among the more significant trends in all countries/ regions studied.

Findings from this study will provide a better understanding of the future of NBT, thereby benefiting businesses, public agencies and policy makers. This is crucial, given the diversity and complexity of the NBT sector. This research is part of BIOTOUR, a multi-disciplinary research project with the overall hypothesis that an integrated perspective of the nature-based tourism sector will provide a basis for innovative products and a more sustainable development.

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